TeamMate Analytics 6.0 Release Notes – October 2018

This is a major release with exciting new features and enhancements, including:

Capability to Analyze More than 1 Million Rows

Custom Modules are no longer constrained by Excel's row limit of 1,048,576 rows. Now, with Excel 2016 they can perform analysis on much larger files, while still operating within the familiar Excel interface, and delivering all results through Excel.

Additional Custom Module Enhancements

Alongside the ability to analyze more than 1 million rows, custom module PivotTable and Report outputs can now be customized. CSV files can also be natively used as an input format.

Customizable Company Content

All content within the software—custom modules, date lists, word lists, normalization rule lists, formulas and test libraries—is now separated into TeamMate Analytics content, User content, and Company generated content allowing organizations to distribute and manage their own content independently from content from other sources.

New Data Manipulation Tools

New tools for converting datetime data into just dates or just times.

This version comes in the form of full installs only and will upgrade existing TeamMate Analytics and TopCAATs installations.

Please review the Caveats section at the bottom of this document.

Enhancements in this Release

Reference	Area	Details
S-38881	Custom Modules	Added logic (depending on the size of the data file used in a Custom Module) to automatically use the appropriate tool—Excel or a SQLite database—to analyze the data. A database will be used when the file size is greater than Excel's limits. Added an option to force a Custom Module to use a database for calculations, rather than Excel.
S-38163	Custom Modules	Added database settings button to data source blocks. This allows the location and name of the database to be specified, along with options to automatically overwrite databases with the same name or delete the database after use.
S-38793	Custom Modules	Updated the format of the Custom Module output Summary worksheet to more clearly show the details of the module that was run and add the database file location and name.
Various	Custom Modules	Updated all Custom Module tests to enable them to work using either an Excel or Database back-end (with Excel 2016), to allow over 1 million rows of data to be analyzed. This includes: Outliers, Rounded Amount, Exception Report, Words and Phrases, Specific Dates, Between Dates, Between Times, Duplicates, Out of Mask, Split Transactions, Depreciation Recalculation, Random Sample, Negative Zero Positive, Day of Week, Grouped Exception Report, Top and Bottom, Aging, Summarize, Cross-Tabulate, Visualize, Dashboard, Data Manipulation, Normalize Fields, Benford's Testing, Gaps, Column Statistics, Information, and Transaction Scoring.
S-39194	Custom Modules Custom Formula test	Updated the Custom Formula test to only be available when using Excel for analyzing data, since Excel formulas are not compatible with the database.
S-38598	Custom Modules Visualize test	Updated the Visualize test to disable the following options when a database is used for calculation (these options are not compatible with the Excel Data Model). • Date fields: start, end • Numeric fields: grouping, start, end • Time fields: grouping, start, end
S-37826	Custom Modules	Added the ability to customize the structure of a PivotTable output of a Custom Module test. This allows the group by, cross-tabulate by, filter and calculations to be modified, rather than simply using a pre-defined structure. This includes: Outliers, Rounded Amount, Exception Report, Words and Phrases, Specific Dates, Between Dates, Between Times,

Reference	Area	Details
		Duplicates, Out of Mask, Split Transactions, Random Sample, Negative Zero Positive, Day of Week, Grouped Exception Report, and Top and Bottom.
S-37827	Custom Modules	Added the ability to customize the structure of a Report output of a Custom Module test. This allows the result categories to be included, the sort order of the report and the maximum number of records to be modified, rather than simply using a pre-defined structure. This includes: Outliers, Rounded Amount, Exception Report, Words and Phrases, Specific Dates, Between Dates, Between Times, Duplicates, Out of Mask, Split Transactions, Random Sample, Negative Zero Positive, Day of Week, Grouped Exception Report, and Top and Bottom.
S-38614	Custom Modules	Updated Custom Module report outputs to default to showing the first 50,000 results. Updated Options to enable the default number of results to be included in a Custom Module report output to be specified.
S-38613	Custom Modules	Added visible warning on Custom Module report outputs when the number of records shown is fewer than the total found.
S-37671 S-38917 S-39198 S-38045	Custom Modules	Added the ability to use a CSV file as the source for a Custom Module. Options added for the CSV file format and the ability to preview the file.
S-37670	Custom Modules	Added the data source as a block within the Custom Module, for both Excel and CSV data sources. The block also includes a button to open Prepare Sheets.
S-39098	Custom Modules	Removed the "Open Prepare Sheets Designer" button from the Custom Module designer. This has now been moved to the data source block (Excel worksheet or CSV file).
S-38059	Custom Modules	Added the ability to specify date and time masks in Prepare Sheets and Prepare Sheets Designer, for when using a CSV data file. Added logging of selected masks to the Summary worksheet in the Custom Module outputs.
S-38624	Custom Modules	Updated logic used to classify fields as numeric, date or time. Previously, if 80% of the non-blank fields were the expected format, they would be classified as such. Now, 100% of the non-blank fields must be in the expected format. Updated prepare sheets logic to scan the first 10,000 rows of the data to determine the data type in each column (previously 1,000 rows).
S-38308	Custom Modules	Added separate analysis for time cells in the field information. Removed options for performing Kurtosis and Skewness calculations.

Reference	Area	Details
	Column Statistics test	
S-38649	Custom Modules Summarize test	Removed options for calculating Product and Count Numbers.
S-38168	Installer	Updated installer to include required files for using database for calculations.
S-36618	Customizable company content Custom Modules	Updated Custom Module manager to collate TMA, User and company module lists and show icons to distinguish each module's source. Added logic to make TMA and company module lists read-only. Removed "Add standard list" button. Added icons to module groups in the Custom Module ribbon dropdown to distinguish each module's source. Added the ability to specify a custom 16x16px PNG image to use as the icon for any company content, rather than the default icon.
S-37674 S-37466 S-37675 S-37676	Customizable company content Various	Added tabs to the dates, words, normalization and formula tabs in Options showing TMA, user, and company lists. Added logic to make TMA and company lists read-only in each tab. Removed "Add standard list" button from each tab. Added option to Settings 1 to show or hide company tests in the test library. Added tabs to the list selection forms for the tools below, to enable content to be selected from TMA, user, and company lists. • Standalone Exception Report: date lists • Standalone Words and Phrases: word lists • Standalone Normalization: normalization rule lists • Standalone Formulas: formula lists • Custom Module Exception Report: date lists • Custom Module Specific Dates: date lists • Custom Module Words and Phrases: word lists • Custom Module Normalization: normalization rule lists
D-21907	Customizable company content Dates lists	Removed the requirement for each date to have a unique name in the Specific Dates form used by Exception Report and Specific Dates tools.
S-36579	Customizable company content Test library	Added company lists as a source for the Test Library, using the company icon to distinguish those tests.

Reference	Area	Details
S-37423	Customizable company content Test library	Updated the way tests in the Audit Program are stored to distinguish between tests in User, Company, and TMA libraries.
S-39100	Customizable company content Custom Modules	Removed the "Module updates" process. This is now obsolete with the introduction of Company content.
S-38602	Custom Modules Depreciation recalculation test	Updated the logic for depreciation recalculation to better account for unusual situations, such as over-depreciated assets, or assets where salvage value or is greater than acquisition cost.
S-38882	Activity logging	Added the ability to log TeamMate Analytics activity to the Windows Event Log.
S-35729	Manipulate Fields	Added 2 new tools to the Field Manipulation menu: • Convert DateTime to Time • Convert DateTime to Date
	Custom Modules – Standard Modules	Updated standard modules, adding new versions for analyzing under and over 1 million rows.
	Demo tutorial	Updated demo tutorial slides.

Defects Addressed in this Release

Reference	Area	Details
D-21583	Performance	Increased the speed of loading a custom module and memory usage of Prepare Sheets and Custom Module forms.
D-21868	Custom Modules	Added validation to prevent the same column being used for more than one field in Prepare Sheets.
D-21646	Custom Modules	Corrected an issue when using a report output from a Custom Module, each cell in the output would only include the first 255 characters from the source data.
D-20394	Number Analysis	Corrected an issue that if no results were found, the last worksheet in the workbook would be selected, rather than the originally selected worksheet.
D-20395	Join 2 Sheets	Removed extra line breaks in the Cell A1 comment.
D-20966	Highlight Changes	Corrected an issue that Highlight Changes would show an error if a workbook contained full-sheet charts.
D-22190	Options	Corrected an issue when Thai region was set in Windows, the dates tab in Options would not show the dates correctly.
D-22191	Project Details	Corrected an issue if windows DPI was set to higher than 100%, the controls in the Project Details form would grow each time it was opened, making it unusable.
D-20426	Advanced Visualizer Project Details	Corrected an issue where Project Details would not run with an empty worksheet selected. Corrected an issue where Advanced Visualizer would run with an empty worksheet selected.
	Conflict with GoFileRoom	Resolved a conflict with GoFileRoom software where, when installed on the same PC as TeamMate Analytics, documents loaded from GoFileRoom would not display correctly in a web browser.

Caveats

Issue	Resolution
We are aware of an issue affecting Office 365/2016 users on the Semi-annual update channel. This issue causes unexpected behavior when closing Excel after running a Custom Module on over 1 million rows of data. This issue does not affect other versions of Excel or Office 365 on the Monthly update channel.	We expect this issue to be resolved by Microsoft in January 2019. This issue does not impact the functioning of TeamMate Analytics but customers should be aware of this known issue.